



AI in Fergus 101

How AI works across Fergus and where you'll use it.

Meet the AI built into Fergus

AI works across Fergus to help you manage jobs and get admin done. You can ask questions or describe what you need by typing or speaking in plain English.

It uses the jobs, customers, quotes, invoices and schedules already in your Fergus account. It can find information, prepare admin and help update work, with you checking the important details.

WHY USE OUR AI?

Less searching, less re-entering information and a clearer next step.

Because it works with the information already in your Fergus account, you spend less time finding and repeating details. Start with one task you already do regularly and see where it saves you time.

 **Think of it as an extra pair of hands that already knows its way around your Fergus account.**

How AI works in Fergus

Whichever experience you're using, the AI starts with the information already in Fergus. There are no special commands to learn. Just describe what you need in plain English.

1 Ask or tell

Ask a question and Fergus finds the answer. You can give it a task to prepare or it can update work.

2 Add details

Keep the conversation going. If anything important is missing, Fergus will ask.

3 Check the result

Review what Fergus has found, prepared or updated.

TIPS FOR WORKING WITH AI IN FERGUS

There are no special commands to learn. A useful request usually includes:

1. What you want

Start with an action or an outcome such as find, create, update, draft or compare.

2. What it's about

E.g. Name the job, customer, quote, invoice.

3. Any details that matter

Add things like the address, tone, date or how you want the information grouped.

FOR EXAMPLE

"Draft a short, friendly follow-up email for the overdue Smith invoice."

KEEP THE CONVERSATION GOING

Add more detail, ask another question or give Fergus the next instruction:

TRY ASKING

"Okay, who is that job assigned to?"

"Break that down by week."

"Show me what you've prepared."

If something important is missing, Fergus can ask you for more information.



Where does AI show up?

There are two ways to use AI in Fergus: through the Fergus you already use, or through the new AI-native experience.

IN THE FERGUS YOU USE TODAY



Fergus Assistant

AT THE DESK

WHAT IT HELPS WITH

- Find information across your jobs
- Prepare everyday admin
- Update work inside Fergus
- Explore reports and business information



Fergus Assistant

IN FERGUS GO

WHAT IT HELPS WITH

- Find job and schedule information
- Record time, notes and tasks on site
- Updated while details are fresh via voice

WHAT IT TAKES OFF YOUR HANDS

Finding details, drafting emails, creating quotes & invoices, updating jobs & digging through reports.

A NEW WAY TO WORK



Fergus AI

The new way to run the business,

WHAT IT HELPS WITH

- Find job, customer, quote & invoice details
- Draft emails, follow-ups and job notes
- Prepare and review quotes and invoices
- Run custom reports and queries about your business data

WHY IS IT DIFFERENT?

Fergus AI works like an extra pair of hands across the business by staying on top of what needs attention, lining up the next step but leaving the decisions to you.

WHAT IT TAKES OFF YOUR HANDS

Checking jobs one by one to find what needs attention and work out what should happen next.

How Fergus Assistant fits across the day

Capture updates on Fergus Go, then review jobs, prepare invoices and check reports at your desk.

BEFORE THE DAY STARTS

Open Fergus Assistant and ask, “What needs my attention today?”

ON SITE

Use Fergus Asisstant to log your time and add a job note by voice.

BACK AT THE DESK

Draft follow-ups, prepare invoices & check reports at the end of the day

You’re still in charge. AI in Fergus helps with the admin. It doesn’t replace your judgement. Check important details before approving or sending anything, especially customer messages, quotes and invoices.